

Military Market

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MAGAZINE FOR THE MILITARY RETAIL SYSTEM

ARMY TIMES PUBLISHING COMPANY

APRIL 1986 \$4.00



**Commissaries
Change the Rules:
Brokers Do More
Work and Paperwork.**



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APRIL 1986

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serving the military
resale system

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Veterans Canteen Service

Canteen chiefs spout off about some big problems

IT'S PRACTICALLY unanimous... Canteen chiefs think the worst problems plaguing the Veterans Canteen Service are poor internal communications, low morale, a lack of top leadership, contracting-out and the threat of reorganization.

"A capable director must be named, A-76 resolved and reorganization decided upon. If not soon, service will be impeded," summarized one chief.

In January, a MILITARY MARKET survey was sent to every VCS canteen chief in the country — all 172 of them. Ninety-nine were returned. This extraordinarily high rate of return indicates a lot of anxiety in the field right now.

While respondents were given the option of replying anonymously, nearly a third included their names and telephone numbers and invited us to call them for additional remarks.

Much of the survey was open-ended, but the responses generally addressed five areas:

□ Poor communications: The Council of Chiefs is a advisory body of canteen chiefs, elected by their peers, who meet at the call of the agency director to discuss subjects of interest to chiefs. The Council has not been convened in more than a year.

"Central Office seems to be slipping into its own little world and no longer comprehends what happens in the real world of a canteen.... Has CO forgotten the Council," asked one respondent, "or don't they want feed-up?"

Another noted that "there has been no communication between Central Office and the canteens since the [House Veterans Affairs Committee] hearing was held" last September. Said someone else, "No communication to the Field Office and to the canteens is tearing a good organization apart."

A hotline, operated by Central Office, had "opened channels to air our concerns and expressions. However, it appears the hotline has been quietly discontinued," a chief said.

□ Low morale: "Morale appears to be at the lowest ebb in my memory,"

one chief summarized.

This is causing staff erosion. "Many of my counterparts have left the VCS and gone into the private sector because of the uncertainty of their jobs and future. We are tired of being lied to and kept uninformed."

Another chief said that it's been over two years since he was visited by either supervisory or audit staff. "Putting it bluntly, I need a pat on the back or a kick in the ass to be continually motivated."

□ A perceived lack of top leadership at Central Office: "We need direction and leadership badly," said one chief, summarizing many survey returns.

A large number of respondents volunteered that leadership from Central Office was lacking. Many said the agency needed to appoint a more qualified leader to serve permanently as director rather than allowing the position to remain filled by an acting director.

The top job in the Canteen Service is currently held by Dr. Robert Leyton, who has been "acting" for over a year. His superior until recently was Marjorie Quandt. (Quandt was replaced by Mansell Piper as assistant chief medical director for administration in the Veterans Administration's department of medicine and surgery since this survey was distributed.)

Both Quandt and Leyton were repeatedly cited by name as causing problems for the organization.

Said one chief, "We need Dr. Leyton... replaced with a permanent qualified director as soon as possible. A career VCser would be wonderful." Commented another: "Dr. Leyton has refused to discuss this issue of reorganization with me, stating that it is not my concern."

Regarding Ms. Quandt's testimony at the congressional hearings last fall, one chief commented that "What she said there and what she has tried to do to us are two different things."

□ Contracting-out: There were few respondents who favor the idea of contracting out canteen-operated food services — only four out of 95 liked the idea.

Supervision problems were cited as one reason to oppose contracting-out: "It will add an extra — insulating — layer to the operation. Small complaints will thus be almost completely ignored. Medium complaints will be handled over a period of days or weeks." Said another chief, "contract administration will be cumbersome, out of touch with customers and a full-time monitoring task. All changes or innovations will have to be negotiated."

Chiefs also worry about product selection. "To be more competitive, the entire scope of food service would have to change from a full-service cafeteria to a fast food joint. I don't feel the veteran or the employee would like that type of change."

Many chiefs have already conducted studies based on the Office of Management and Budget's A-76 regulations. But even those who said their canteens would not be subject to the studies opposed contracting-out.

Contracting out "will set us back 30 years" to where the agency used to be, said one chief. "The service and the price scale would definitely change and this change would be bad!" Added another, "Anybody who knows the origin of the VCS knows that we were formed because of abuse of patients by concessionaires prior to 1946."

Nevertheless, a minority of chiefs favor contracting-out due to their frustrations with federal personnel policies. The four who indicated they favor contracting-out all cited staff problems of one sort or another. A contractor, said one, "would not be restricted by the bureaucratic personnel policies that we deal with."

□ The threat of reorganization. Though all respondents indicated they knew of the possibility of reorganization in the agency, many chiefs knew so little about the plan that they said they had to reply "No" or "Don't Know" to Question No. 5.

"Virtually no information has been issued to the field," said one chief. "Communication within the Canteen Service is currently non-existent with respect to reorganization," added an-

other. "No one has explained what the reorganization is all about — how it would help or hurt the VCS. No one says shit to anyone," said a third.

The most recent version of the plan proposes centralizing the agency by closing the three field offices. Medical center directors would subsequently assume more responsibility for the canteens at their locations. There would be a minimum of direction from CO.

One long-time chief predicted that, "once the canteen fell directly under the hospital director's control, we can kiss the canteen goodbye." Another said that hospital directors "are so busy with other services, they don't know we are alive, and they should not handle appropriated and non-appropriated funds."

Most chiefs who are familiar with the plan oppose it, they said, because past experiences with centralized management showed it was inefficient. A reorganization two-plus years ago consolidated VCS' five finance offices into a single one, and reduced the agency's five field offices down to three. "If [the next reorganization] works as well as the last one, we probably won't survive," said one chief.

There were a few chiefs — 16 out of 98 — who think VCS needs to be reorganized to boost morale and open lines of communication between the field and Central Office. But they did not agree with what is being proposed.

"Reorganization is not necessarily bad, provided control of canteen operations remains with the VCS," said one chief. He added that, "it is vital

and proper that the VCS maintain a very strong relationship with each medical center director." But, he concluded, "I disagree with [Central Office's] method of achieving this through giving control to hospital directors."

The survey revealed some sourness about the three field offices. Reorganization would be good, said one chief, "because all a supervisor does is disrupt business, make changes that may or may not be good for the station, and yet we're stuck with them and have to live here." He noted that, by eliminating the middle layer of management, "canteens in the field would not be stuck with financing [field offices]."

But field offices are a necessary evil, most chiefs thought. "While I do not like to have a field supervisor breathing down my neck, there are times when their expertise is needed."

A couple of chiefs said they really weren't sure what to think about a reorganization, but it was obvious that something needs to be done. "I'm tired of all the dissension between field office, Central Office and each field operation. I don't know which side of the fence to get on.... Let's get on with reorganization or something."

Other problems to be addressed:

Congressional intervention: The majority of respondents saw last fall's congressional hearing as helpful in airing the agency's concerns. "Only Congress can cut out the bull now."

But other people were less confident that the hearing accomplished

anything: "All it did was put everything in a hold pattern. I am up to my eyes in an A-76 study and Field Office does not know whether to shit or go blind."

Improved purchasing. Frustration was expressed with the fact that all buying decisions are made in Washington and chiefs have little control over merchandise selection. "Lift all restrictions on sales," said one chief. "I am paid a good salary to manage a cafeteria and retail store and I cannot sell merchandise that I know is in demand," added another.

Fiscal problems. Some chiefs traced the agency's fiscal problems to the reorganization two years ago which brought the regional finance offices into a single finance center in St. Louis. It was variously suggested that the regional payment centers be reinstituted, or else that financial control be brought down to the local level.

As the system is currently operated, there are hidden losses caused by lost discounts for prompt payment, one chief charged. It was also suggested that the VCS revolving fund be invested in an interest-bearing account.

Salary structures. Salaries in the canteen and elsewhere at the station should be identical for the same work, chiefs say. "In no way can a dishwasher in Dietetics be worth \$3 to \$4 per hour more than the employee in the VCS when the VCS employee is starting out \$1 to \$2 more than a dishwasher in the community."

Training: "Present VCS training guides are now considered antiques."

Career patterns: With the current structure, "Upward mobility is dead." MM

1 — How long have you been a canteen chief? Answers ranged from 1 to 30 years. Average among 98 respondents was 9.7 years.

2 — Were you employed by the Veterans Administration before you became a canteen chief? Yes — 49. No — 49. If yes, in which capacity? Variety of answers; the majority were assistant chief-canteen service. For how long? 49 respondents averaged 4.6 years of prior service.

3 — In total, how many years have you worked for the Veterans Canteen Service? Responses ranged from 2 to 35 years. Average among 98 respondents was 12.6 years.

4 — What is the biggest change you have seen in the agency since you have been with the VCS? See story.

5 — VCS' central office has proposed an agency-wide reorganization. Are you familiar with these plans? Yes — 78. No — 15. Don't know — 8.

6 — Do you think the proposed reorganization would be good for VCS? Yes — 16. No — 57. Don't know — 25. Why or why not? See story.

7 — Do you think VCS meets its mission of providing services to the war veteran? Yes — 94. No — 4. Don't know — 0. Do you think VCS meets its mission of making enough profit to be a self-sustaining organization? Yes — 86. No — 4. Don't know — 8. Does it achieve this while providing the best possible service for the patron?

Yes — 75. No — 13. Don't know — 7.

8 — What should VCS change so that the organization can better achieve its goals? See story.

9 — Are there any OMB A-76 contracting-out studies going on at your canteen right now? Yes — 47. No — 51. Don't know — 0. Have you participated in such studies in the past, or do you expect to do any in the future? Did in the past — 28. Will do in future — 21. No studies currently scheduled — 32.

10 — Do you think contracting-out can improve the services your canteen gives your customers? Yes — 4. No — 91. Don't know — 3. Why or why not? See story.

11 — As a canteen chief, how do you stay in touch with your customers? See story.

12 — Do you feel your customers are satisfied with the services your canteen offers? See story.

13 — Last September, the House Veterans Affairs Committee held a hearing on VCS. Do you think the hearing was beneficial to the canteen service? Yes — 50. No — 15. Don't know — 29. Why or why not? See story.

14 — Do you think the Veterans Affairs Committee should call another hearing? Yes — 80. No — 10. Don't know — 27. If it does, what do you think it could accomplish? See story.

15 — What do you think is the primary mission of VCS? See story.

AAFES Million Dollar Vendors

The following is a list of the 528 suppliers who did \$1 million or more worth of business with the Army and Air Force Exchange Service during FY 1985. The list includes manufacturers, brokers, construction firms and services providers.

Companies are ranked in order of total dollars.

The values shown are rounded to the nearest ten thousand dollars. For example, the first supplier on the list

— the Defense Personnel Support Center — did \$115,393,909.43 in business with AAFES last fiscal year. The MILITARY MARKET list of AAFES vendors shows this as \$115.39.

The source for this information is official AAFES records. Photocopies of the complete list — which includes both ConUS and overseas net payments — are available by writing to MILITARY MARKET, Springfield, VA 22159.

1	Defense Personnel Support Center	\$115.39	71	MCA Records Dist. Corp.	\$6.11	141	Minolta Corp.	\$3.41
2	Chevron USA Inc.	\$57.96	72	Duracell USA	\$6.09	142	Stetten Construction Co.	\$3.36
3	Exxon Company USA	\$47.61	73	Distron Dist. Center	\$6.00	143	William Carter Co.	\$3.35
4	Eastman Kodak Co.	\$40.77	74	Union Carbide Corp.	\$5.97	144	Pennzoil Company	\$3.35
5	Philip Morris Inc.	\$39.90	75	Stuart Hall Co., Inc.	\$5.92	145	Nabisco Inc.	\$3.35
6	R. J. Reynolds Tobacco Co.	\$26.45	76	ARA Services DF	\$5.89	146	Armour and Company	\$3.31
7	Procter & Gamble Dist.	\$24.67	77	Oraomenca	\$5.67	147	Richardson-Vicks Inc.	\$3.29
8	Beverages Foods & Svc.	\$19.95	78	Sharp Electronic Corp.	\$5.50	148	Cove Shoe Co.	\$3.29
9	Revlon Inc.	\$19.69	79	Nabisco Inc.	\$5.46	149	Jeffries Hosiery	\$3.27
10	Levi Strauss & Co.	\$18.55	80	American Tobacco Co.	\$5.27	150	Sony Corp. of America	\$3.27
11	Shell Oil Co.	\$17.65	81	Firestone Tire & Rubber	\$5.25	151	Harry Sugarman Inc.	\$3.26
12	Coastal States Marketing	\$17.41	82	Bell Fuels	\$5.18	152	Commodore Business Machines	\$3.26
13	Frito-Lay Inc.	\$17.35	83	Colgate Palmolive Co.	\$5.13	153	Vanguard Mil. Equip. Corp.	\$3.24
14	American Greeting	\$17.24	84	Miller Brewing Co.	\$5.10	154	Mobil Oil Credit Corp.	\$3.23
15	RCA Solid State	\$15.40	85	Kenwood Electronics Inc.	\$5.09	155	IBM Corp.	\$3.21
16	Texaco Inc.	\$14.10	86	MTD Products Inc.	\$5.04	156	Sunmark Ind.	\$3.20
17	Belcher Oil Co.	\$14.06	87	Int'l. Playtex Inc.	\$5.01	157	Sanyo Electric Inc.	\$3.19
18	Anheuser-Busch Inc.	\$13.91	88	Craighton Shirt Co. Inc.	\$5.01	158	M. J. Soffe Co. Inc.	\$3.17
19	Gasco Gasoline Inc.	\$13.20	89	Derossi & Son Co.	\$4.96	159	Lighthouse Ind. For Blind	\$3.13
20	Promana Inc.	\$13.15	90	Maidenform Inc.	\$4.94	160	Timex Corp.	\$3.11
21	Panasonic West Inc.	\$13.13	91	Liz Claiborne Inc.	\$4.79	161	Texas Instruments	\$3.10
22	Amoco Oil Co.	\$12.95	92	Military & Spec. Markets	\$4.75	162	Dexter Shoe Co.	\$3.10
23	Spring Industries Inc.	\$12.91	93	Rubbermaid Inc.	\$4.73	163	Seiko Time Corp.	\$3.08
24	Coca-Cola Exp. Corp.	\$12.53	94	E. J. Brach & Sons	\$4.73	164	IRA Green Inc.	\$3.07
25	Amerasia Hess Corp.	\$12.33	95	Burlington (R) Socks	\$4.73	165	Intercraft Ind. Corp.	\$3.07
26	The Gillette Company	\$12.01	96	Health-Tex Inc.	\$4.70	166	Capitol Records Inc.	\$3.07
27	General Electric Co.	\$11.73	97	Airway Ind. Inc.	\$4.64	167	Kenner Prod. Co.	\$3.01
28	Black & Decker	\$11.37	98	NCR Micrographics Systems	\$4.60	168	Magicolor Paint Co.	\$2.98
29	WEA Corp.	\$10.36	99	General Services Administration	\$4.55	169	Chevron Chemical Co.	\$2.98
30	Acme Boot Co.	\$10.21	100	N. S. Meyer Inc.	\$4.53	170	Quaker Oats Co.	\$2.96
31	M & M Mars	\$10.17	101	General Foods Corp.	\$4.50	171	Charles of the Ritz	\$2.96
32	Brown & Williamson	\$9.87	102	Hanes Knitwear	\$4.44	172	Kwi Polish Co. USA Div.	\$2.95
33	Nike Inc.	\$9.82	103	Toshiba America Inc.	\$4.26	173	Original Designs Inc.	\$2.94
34	Cannon Mills	\$9.81	104	Vanco	\$4.23	174	Stedman Corp.	\$2.93
35	Manhattan Store	\$9.79	105	Arrow Co.	\$4.22	175	ITT Continental Baking	\$2.92
36	Goodyear Intl.	\$9.43	106	Amana Refrigeration Inc.	\$4.21	176	Liggett & Meyers Tob. Co.	\$2.91
37	Max Factor & Co.	\$9.28	107	Estee Lauder Intl. Inc.	\$4.21	177	Polygram Dist. Inc.	\$2.90
38	Johnson & Johnson	\$9.18	108	Oscar Mayer & Co.	\$4.16	178	Selchow & Righter Co.	\$2.90
39	Weintraub Eros & Co.	\$9.07	109	Carnation Co.	\$4.12	179	Pendleton Woolen Mills	\$2.88
40	Hallmark Cards Inc.	\$9.06	110	Corning Glass Works	\$4.04	180	Campbell Soup Co.	\$2.85
41	Apple Computer Inc.	\$9.03	111	Pan American Dia Corp.	\$4.03	181	Kangaroos USA Inc.	\$2.85
42	Artex Mfg. Co. Inc.	\$8.94	112	John K. Kealy Co.	\$4.03	182	Reebok International Ltd.	\$2.84
43	Monarch Crown Corp.	\$8.76	113	U. S. Tobacco Co.	\$4.03	183	Coleman Cn.	\$2.82
44	Diamond Shamrock Corp.	\$8.66	114	Seven-Up Enterprises	\$4.01	184	M. Fabrikant and Son	\$2.82
45	Canon USA Inc.	\$8.45	115	Dr. Pepper Bev. Sales Co.	\$3.99	185	C. Lloyd Johnson Co. Inc.	\$2.81
46	Fisher Corp.	\$8.38	116	Prestolite Battery Div.	\$3.98	186	Martin Mfg. Co. Inc.	\$2.81
47	Minnesota Mining Mfg. Co.	\$8.32	117	Sandberg & Sikorski	\$3.96	187	Bulova Watch Co. Inc.	\$2.81
48	Polaroid Corp.	\$8.11	118	Coleco Ind. Inc.	\$3.94	188	Regal Ware Inc.	\$2.81
49	Conoco Inc.	\$8.07	119	Kraft Inc.	\$3.93	189	The Stroh Brewery Co.	\$2.77
50	Kayser-Roth Hosiery Inc.	\$7.99	120	Action Industries Inc.	\$3.90	190	Atlas Chain Co.	\$2.76
51	Kimberly-Clark Corp.	\$7.98	121	S. C. Johnson & Son Inc.	\$3.88	191	Sunbeam Leisure Prod. Co.	\$2.76
52	Jockey International	\$7.91	122	Fieldcrest Mills Inc.	\$3.84	192	Audiovox Corp.	\$2.73
53	CBS Records	\$7.86	123	Hoover Co.	\$3.84	193	Sonoco Products Co.	\$2.72
54	Mattel Toys	\$7.86	124	Samsonite Furniture Co.	\$3.81	194	Mennen Co.	\$2.72
55	Hanes Hosiery	\$7.85	125	Berkline Corp.	\$3.81	195	Union Underwear Co.	\$2.71
56	NCR	\$7.79	126	Singer Co.	\$3.76	196	Wilson Foods Corp.	\$2.63
57	Lonilard	\$7.73	127	Wolverine World Wide	\$3.76	197	New Balance Athletic	\$2.62
58	Haggar Co.	\$7.50	128	Baskin Robbins Inc.	\$3.73	198	Lee Company	\$2.62
59	Tolson Oil Co.	\$7.35	129	Total Petroleum Inc.	\$3.72	199	Hilax Poly Co. Inc.	\$2.62
60	Zenith Electronics Corp.	\$7.21	130	Beard-Poulton/Weed Eatr	\$3.72	200	Geo. A. Hormel & Co.	\$2.60
61	Hershey Chocolate Co.	\$6.96	131	Bordon De Pr	\$3.71	201	J. G. Durand Int'l	\$2.59
62	Elizabeth Arden	\$6.78	132	Brigade Brands Ltd.	\$3.67	202	The Nestle Co. Inc.	\$2.58
63	Tesoro-Alaska	\$6.71	133	Life Savers Inc.	\$3.63	203	M. Cotler Co.	\$2.57
64	Quaker State Oil	\$6.70	134	L'eggs Products	\$3.63	204	Elkay Industries	\$2.57
65	Pioneer Video Inc.	\$6.69	135	Nabisco Brands USA	\$3.60	205	DNP America Inc.	\$2.56
66	Kraft Retail Food Group	\$6.66	136	Oster Corp.	\$3.58	206	Carter-Wallace Inc.	\$2.54
67	Bose Corp.	\$6.56	137	S. H. S. Garment Inc.	\$3.53	207	Citizen Watch Co.	\$2.54
68	Tesoro Ref. & Marketing	\$6.54	138	Lever Bros Co.	\$3.53	208	Roadmaster Corp.	\$2.53
69	Freeman Shoe Co.	\$6.46	139	Russell Corp.	\$3.51	209	Beecham Products	\$2.53
70	Fisher-Price Toys	\$6.24	140	Huffy Corp.	\$3.44	210	Ekco Housewares Co.	\$2.52

211	L Oreal	\$2.50	317	Facciola Meat Co.	\$1.67	423	Berkey Film Processing	\$1.19
212	Keebler Co.	\$2.48	318	Russ Berrie & Co. Inc.	\$1.66	424	Meinor Industries	\$1.19
213	Vanity Fair Mills Inc.	\$2.47	319	Hunt-Wesson Foods Inc.	\$1.66	425	Del Monte Corp.	\$1.19
214	AT&T Consumer Products	\$2.45	320	Nikon/Ehrenreich Photo	\$1.66	426	Glencort Inc.	\$1.18
215	Eureka Company	\$2.43	321	Ralston Purina Co.	\$1.65	427	Giddien Distributing Co.	\$1.18
216	Pennex Products Co. Inc.	\$2.42	322	Marx & Newman Co.	\$1.65	428	Izod	\$1.17
217	Russell Hosiery Mills	\$2.42	323	Northern Petrochemical	\$1.64	429	Custom Sales & Service	\$1.17
218	Questor Juvenile Products	\$2.41	324	Anderson/Organic-Hyponx	\$1.64	430	Randolph Engineering	\$1.17
219	Mobil Chemical Co.	\$2.40	325	Foremost Dairies Inc.	\$1.64	431	Binney & Smith Inc.	\$1.17
220	Tomy Corp.	\$2.39	326	Puritan Fashions Fin. Co.	\$1.64	432	U. S. Playing Card Co.	\$1.17
221	Kellogg Sales Co.	\$2.38	327	Maxell Corp. of America	\$1.63	433	Noxell Corporation	\$1.16
222	Casio Inc.	\$2.37	328	Thermos Div.	\$1.63	434	Hygiene Industries	\$1.16
223	Etonic Inc.	\$2.35	329	Alberto-Culver Co.	\$1.63	435	Converse Inc.	\$1.16
224	Buster Brown Apparel Inc.	\$2.35	330	Hasbro Ind. Inc.	\$1.61	436	Garan Inc.	\$1.16
225	General Mills Inc.	\$2.34	331	Peter Paul Cadbury Inc.	\$1.60	437	Allergan Pharm. Inc.	\$1.15
226	M & M Luggage Co. Inc.	\$2.34	332	Chase Chem. Co.	\$1.60	438	S. Lichtenberg & Co. Inc.	\$1.15
227	Hitachi Sales Corp. America	\$2.33	333	Holison Co.	\$1.59	439	U. S. Shoe Corp.	\$1.15
228	Hamilton Beach	\$2.32	334	American Lock Co.	\$1.59	440	Soft Shaven Prod. Inc.	\$1.14
229	Tyson's Foods Inc.	\$2.31	335	Hummelwerk	\$1.59	441	Kaepa Inc.	\$1.14
230	London Fog	\$2.31	336	R. J. Sperry Co.	\$1.58	442	Magnacolor Photo Labs	\$1.14
231	Fisher Nut Co.	\$2.28	337	Direct Import Corp.	\$1.58	443	Pabst Brewing Co.	\$1.14
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234	Rayette Division	\$2.23	340	Members Only	\$1.57	446	Napier Co.	\$1.14
235	Douglas E. Barnhart Inc.	\$2.22	341	Tonka Corp.	\$1.56	447	Brakebush Brothers Inc.	\$1.13
236	Chic Hosiery Corp.	\$2.22	342	Cochran Construction Co.	\$1.56	448	Paul L. Dodds Co.	\$1.13
237	Finance/Acct. Officer	\$2.20	343	Hamilton Watch Co.	\$1.55	449	Music and Horth	\$1.13
238	Pillowtex Corp.	\$2.18	344	Rival Mfg. Co.	\$1.55	450	Goody Products Inc.	\$1.12
239	Anchor Hocking Corp.	\$2.15	345	J. P. Stevens & Co. Inc.	\$1.54	451	Pfizer Inc.	\$1.12
240	Kirsch Co.	\$2.12	346	A. T. Cross Co.	\$1.54	452	Dennison Mfg. Co.	\$1.12
241	Campus Sportswear	\$2.11	347	Almet/Lawlrite	\$1.53	453	Bastian-Blessing	\$1.12
242	Wembley Ind. Inc.	\$2.11	348	North Slope Technical	\$1.53	454	Howard W. Pence Inc.	\$1.12
243	Morgen & Oswald Const.	\$2.11	349	Danal/Access Assoc. Inc.	\$1.52	455	Menley & James Labs	\$1.12
244	Lasko Metal Products	\$2.11	350	Skil Corp.	\$1.51	456	North American Philips	\$1.11
245	General Motors Corp.	\$2.10	351	Polo Fashions Inc.	\$1.50	457	Nat'l. Distr. Co.	\$1.11
246	JVC-US Corp.	\$2.10	352	Plough Inc.	\$1.50	458	Coats & Clarks SLS Corp.	\$1.11
247	Oneida Ltd.	\$2.09	353	Whitmans Chocolates Div.	\$1.49	459	Tambrands Inc.	\$1.10
248	Northern Electric Co.	\$2.09	354	Jack Hilliard Dist.	\$1.48	460	Mead Products	\$1.10
249	Parker Pen Co.	\$2.08	355	W. H. Mosely Co. Inc.	\$1.47	461	M & M Products Co.	\$1.10
250	A. W. Mendenhall Co. Inc.	\$2.07	356	Sport-Obermeyer Ltd.	\$1.47	462	Bausch & Lomb	\$1.10
251	Whitehall Laboratories	\$2.06	357	Sony Corp. Of America	\$1.47	463	Leviton Mfg. Co.	\$1.10
252	Capital Mercury Shirt	\$2.06	358	Moore Mfg. Inc.	\$1.46	464	The Florsheim Shoe Co.	\$1.09
253	Ocean Pacific Longrider	\$2.06	359	Sperry Top-Sider Inc.	\$1.44	465	Speidel Div. Textron Inc.	\$1.09
254	Hazel	\$2.05	360	Tucker Housewares	\$1.44	466	Jordache for Kids	\$1.09
255	Shulton Inc.	\$2.05	361	Smoke Craft Inc.	\$1.43	467	Child Craft	\$1.09
256	Sansui Electronics Corp.	\$2.05	362	Koret of California Inc.	\$1.43	468	Aberdeen Sportswear	\$1.09
257	Waterford Crystal	\$2.05	363	Ajay Enterprises Corp.	\$1.43	469	Muscogee News Co.	\$1.09
258	Les-e Fay Inc.	\$2.04	364	Russell Stover Candies	\$1.42	470	Rubbermaid Speciality	\$1.08
259	Warner Cosmetics Inc.	\$2.04	365	Vendo Co.	\$1.42	471	Pendleton Flour Mills	\$1.08
260	G. H. Bass & Co.	\$2.04	366	Bullfrog Knits Inc.	\$1.42	472	I-Ski Skiglasses	\$1.08
261	Cosco/Peterson	\$2.03	367	A. H. Robins Co.	\$1.42	473	Tomboy of Calif.	\$1.08
262	Glaser Brothers	\$2.03	368	Weather Tamer Prod.	\$1.41	474	Igloo Corp.	\$1.08
263	Amdahl Corporation PR	\$2.02	369	A & W Beverages Inc.	\$1.40	475	Jensen Sound Labs.	\$1.08
264	Sweetheart Products Group	\$2.01	370	Olympic Const. Inc.	\$1.40	476	Cal Sport	\$1.08
265	Russ Togs Inc.	\$2.01	371	Foster Western Inc.	\$1.40	477	Zodiac Trading Co.	\$1.08
266	Remington Products Inc.	\$2.01	372	Stainless Inc.	\$1.40	478	Coca Cola Bottg. Co.	\$1.08
267	Toastrmaster Inc.	\$2.00	373	Army Times Publishing Co.	\$1.38	479	Klipsch	\$1.07
268	Best Foods	\$2.00	374	Sale Knitting Co.	\$1.38	480	JFC International Inc.	\$1.07
269	Champion Lab Inc.	\$2.00	375	Burma-Bibas Inc.	\$1.38	481	Ennervision Enterprises	\$1.06
270	Sunbeam Appl. Svc. Co.	\$2.00	376	Bernard Cap Co. Inc.	\$1.38	482	Bausch & Lomb	\$1.06
271	Mikasa	\$1.98	377	Parker Brothers	\$1.38	483	Miles Laboratories Inc.	\$1.06
272	Farah Mfg. Co.	\$1.98	378	Murray Ohio Mfg. Co.	\$1.38	484	Totes Inc.	\$1.06
273	Champion Spark Plug Co.	\$1.96	379	Bic Pen Corp.	\$1.37	485	Richheimer/Hachslar	\$1.05
274	Master Lock Co.	\$1.95	380	Jordache Enterprises	\$1.37	486	TDK Electronics Corp.	\$1.05
275	Pearce-Trawick Contract	\$1.93	381	Wings Intl. Luggage Corp.	\$1.37	487	Jaymar-Ruby Inc.	\$1.05
276	Weaver-Proctor Silex	\$1.93	382	Town & Country	\$1.37	488	Teddyne Water Pik	\$1.05
277	Autry Ind. Inc.	\$1.93	383	Goid Eagle Prod. Co.	\$1.35	489	Keystone Camera Corp.	\$1.05
278	Kendall Co.	\$1.92	384	Vita-Fresh Vitamin Co.	\$1.34	490	Three Mountaineers Inc.	\$1.04
279	Maybelline	\$1.92	385	Saranac Glove Co. Inc.	\$1.34	491	Seymour Div.	\$1.04
280	Stride Rite Corp.	\$1.92	386	O. M. Scott & Sons Co.	\$1.33	492	H. K. Schaeffer & Co.	\$1.04
281	Wm. Wrigley Jr. Co.	\$1.91	387	Pepsi Cola - Gen. Btlr.	\$1.33	493	Anderson News Company	\$1.04
282	Aircap Mfg. Co.	\$1.91	388	Bigelow-Sanford Inc.	\$1.32	494	B & B Beverage Co.	\$1.04
283	Pentax Corp.	\$1.91	389	Flying J Inc.	\$1.32	495	Banquet Foods Corp.	\$1.04
284	Prince Matchabelli	\$1.90	390	Pulsar Time Inc.	\$1.31	496	Robin Undies	\$1.04
285	Donmoor Inc.	\$1.89	391	T. A. B. Mens Accessories	\$1.31	497	Lane Limited	\$1.03
286	Pony Spts. & Leisure Inc.	\$1.89	392	Tyson Metal Products	\$1.30	498	Weiner News Company Inc.	\$1.03
287	Sinclair Marketing Inc.	\$1.85	393	Club Prod. Co.	\$1.30	499	CPM Construction Inc.	\$1.03
288	Fashion Fair Cosmetics	\$1.84	394	Pepsi-Cola Bottling Co.	\$1.30	500	Fabril Mfg. Corp.	\$1.03
289	Brown Shoe Company	\$1.83	395	White Stag Mfg. Co.	\$1.29	501	Bally Case & Cooler Inc.	\$1.03
290	American Safety Razor	\$1.83	396	CFS Continental Foods	\$1.29	502	Isla Petroleum	\$1.03
291	Foster Grant Corp.	\$1.83	397	Economics Laboratory Inc.	\$1.28	503	CBS Toys	\$1.03
292	Tappan Appliance	\$1.82	398	Toombs and Co. Inc.	\$1.28	504	Scholl Inc.	\$1.02
293	BASF Systems Corp.	\$1.80	399	Vivitar Corp.	\$1.27	505	Prince Mfg. Inc.	\$1.02
294	Intl. Seaway Trading Co.	\$1.79	400	Automatic Prod. Co.	\$1.27	506	Weber-Stephen Prod. Co.	\$1.02
295	Brother Intl. Corp.	\$1.78	401	American Home Foods	\$1.27	507	Diversified Prod.	\$1.02
296	Westbend Co.	\$1.77	402	Atlas Dist. Co.	\$1.27	508	Vidal Sassoon Inc.	\$1.02
297	Crest Craft Co.	\$1.76	403	Fedders Corporation	\$1.26	509	Bahlsen of No. Amer. Inc.	\$1.02
298	Sunkist Soft Drinks In.	\$1.75	404	Western Publishing	\$1.25	510	Puritan Sportswear Corp.	\$1.02
299	Lenox Inc.	\$1.75	405	Chanel Inc.	\$1.25	511	Soundesign Corp.	\$1.01
300	Monet Jewelers Inc.	\$1.75	406	Standard Colorprint	\$1.25	512	Harold Freeman Jewelry	\$1.01
301	James River Corp.	\$1.75	407	Westclox U.S.	\$1.24	513	Jacqueline Cochran Inc.	\$1.01
302	L. M. Sandler & Sons Inc.	\$1.74	408	Pacific Trail Inc.	\$1.23	514	Susan Crane Inc.	\$1.00
303	Jovan Inc.	\$1.74	409	Buckner and Moore Inc.	\$1.23	515	Pepsi Cola Bottling Co.	\$1.00
304	Unipacific Corp.	\$1.73	410	Sherling Imports Inc.	\$1.23	516	Sweda Intl.	\$1.00
305	Sealy Mattress Co.	\$1.73	411	Revere Copper and Brass	\$1.23	517	Roffs Personal Leather	\$0.99
306	Utility Chemical Co.	\$1.72	412	Bobbie Brooks Inc.	\$1.23	518	Isodent Co.	\$0.99
307	Davis Clothing Co.	\$1.72	413	Milton Bradley Co.	\$1.22	519	New Attitude	\$0.99
308	Bali Co.	\$1.72	414	R. D. Lowman General Con.	\$1.22	520	J. L. Prescott Co.	\$0.99
309	Estech Inc.	\$1.71	415	Brigade Quartermasters	\$1.22	521	C. D. et Cie	\$0.98
310	J. B. L. Inc.	\$1.70	416	Harper Leather Goods	\$1.21	522	PRF Corp.	\$0.98
311	A & M Records	\$1.70	417	Hortex Inc.	\$1.21	523	Radiator Specialty Co.	\$0.98
312	Wilton Enterprises Inc.	\$1.69	418	Lordon Star Limited	\$1.21	524	Johnson Products Co. Inc.	\$0.98
313	York Electronics Corp.	\$1.68	419	Dixie-Riverside Inc.	\$1.20	525	Cidro Sales Corp.	\$0.97
314	B. F. Goodrich Co.	\$1.68	420	St. Joseph Packaging In.	\$1.19	526	Sysco Food Systems	\$0.97
315	Shire Magnetics Co.	\$1.67	421	The Bibb Company	\$1.19	527	Certified Corp.	\$0.97
316	Smith-Corona	\$1.67	422	Sterling Dist. Inc.	\$1.19	528	Royal Business Machines	\$0.97

Military Market index

COMMISSARIES

		DECEMBER			YEAR TO DATE		
		CY'85	CY'84	% CHANGE	CY'85	CY'84	% CHANGE
AIR FORCE*	CONUS	\$157,509	\$149,352	5.46	\$1,859,326	\$1,806,601	2.92
	OVERSEAS	34,020	31,854	6.80	326,770	360,817	-9.44
	TOTAL	191,529	181,206	5.70	2,186,096	2,167,418	0.86
ARMY	CONUS	110,145	110,040	0.10	1,284,255	1,274,175	0.79
	OVERSEAS	35,280	35,070	0.60	379,365	394,380	-3.81
	TOTAL	145,425	145,110	0.22	1,663,620	1,668,555	-0.30
NAVY	CONUS	72,918	76,088	-4.17	757,887	738,446	2.63
	OVERSEAS	8,444	9,477	-10.90	84,404	88,391	-4.51
	TOTAL	81,362	85,565	-4.91	842,291	826,837	1.87
MARINE CORPS	CONUS	14,609	14,612	-0.02	169,913	160,289	6.00
	OVERSEAS	278	263	5.70	3,074	2,621	17.28
	TOTAL	14,887	14,875	0.08	172,987	162,910	6.19
COAST GUARD	CONUS	260	293	-11.26	3,177	3,133	1.40
	OVERSEAS	187	281	-33.45	3,467	3,320	4.43
	TOTAL	447	574	-22.13	6,644	6,453	2.96
ALL COMMISSARIES	CONUS	\$355,441	\$350,385	1.44	\$4,074,558	\$3,982,644	2.31
	OVERSEAS	\$78,209	\$76,945	1.64	\$797,080	\$849,529	-6.17
	TOTAL	\$433,650	\$427,330	1.48	\$4,871,638	\$4,832,173	0.82
GROCERY STORES	U.S. ¹	\$23,532	\$22,733	3.51	\$264,292	\$252,936	4.49

* The Air Force data has been adjusted to reflect the transfer of Alaskan commissaries from the Pacific Region to the California Region because of AFCEMS reorganization, thus accounting for the large percentage change.

EXCHANGES

		DECEMBER			YEAR TO DATE		
		CY'85	CY'84	% CHANGE	CY'85	CY'84	% CHANGE
AAFES	CONUS	\$324,008	\$331,424	-2.24	\$2,928,384	\$2,853,388	2.63
	OVERSEAS	196,764	196,339	0.22	1,897,492	1,878,265	1.02
	TOTAL	520,772	527,763	-1.32	4,825,876	4,731,653	1.99
NAVY	CONUS ²	121,278	116,261	4.32	1,082,444	1,090,248	-0.72
	OVERSEAS ²	50,495	47,171	7.05	452,079	452,726	-0.14
	TOTAL ²	171,773	163,432	5.10	1,534,523	1,542,974	-0.55
MARINES	CONUS	36,643	34,972	4.78	354,021	344,418	2.79
	OVERSEAS	6,116	5,991	2.09	59,815	58,555	2.15
	TOTAL	42,759	40,963	4.38	413,836	402,973	2.70
COAST GUARD	CONUS ³	9,270	8,570	8.17	82,344	76,852	7.15
	OVERSEAS ³	648	1,064	-39.10	6,198	9,954	-37.73
	TOTAL ³	9,918	9,634	2.95	88,542	86,806	2.00
MAIL ORDER	CONUS ⁴	1,563	1,849	-15.47	14,134	15,123	-6.54
	OVERSEAS ⁴	4,420	5,307	-16.71	40,115	48,768	-17.74
	TOTAL ⁴	5,983	7,156	-16.39	54,249	63,891	-15.09
ALL EXCHANGES	CONUS	\$492,762	\$493,076	-0.06	\$4,461,327	\$4,380,029	1.86
	OVERSEAS	\$258,443	\$255,872	1.00	\$2,455,699	\$2,448,268	0.30
	TOTAL	\$751,205	\$748,948	0.30	\$6,917,026	\$6,828,297	1.30
DEPARTMENT STORES	U.S. ¹	\$21,004	\$20,348	3.22	\$135,081	\$129,284	4.48

1) SOURCE: U.S. Department of Commerce. 2) Does not include sales of ship stores. 3) MM estimate, based on official data. 4) Includes consolidated sales for all services, including Coast Guard. NOTE: Individual figures may not add to totals because of rounding. All sales are expressed in millions (add 000), except grocery stores and department stores, which are in billions. Commissary sales include appropriate surcharges, exchange sales include concession volume.